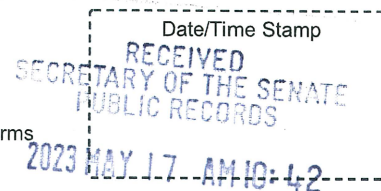


RE-2 Employee Post Travel Disclosure of Travel Expenses

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**



Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):

Postsecondary National Policy Institute

Travel Dates:

04/11/2023 to 04/12/2023

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$109.00	\$98.00	\$79.00	\$238.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

May 17, 2023
Date

PATRICK FOX
Printed Name of Traveler

Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

May 17, 2023
Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change

Revised Amount

Explanation

There were no changes to pre-approved travel expenses.

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation: There were no changes to the pre-approved itinerary.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved.

Name of Traveler:

Patrick Fox

Employing Office/Committee:

HEALTH, EDUC, LAB, AND PENSIONS - REP

Private Sponsor(s):

Postsecondary National Policy Institute

Destination(s):

Warrenton, Virginia

Travel Dates:

04/11/2023 to 04/12/2023

NOTE: If you plan to extend the trip for any reason you must notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

PNPI does a good job of bringing in experts on higher ed for open conversations and explanations about higher education. I have attended these events in the past and found them to be incredibly informative. This particular one will be focused on student loan debt and repayment and I believe because of the current landscape of higher education it would be beneficial to hear multiple viewpoints of this issue.

Do you have an accompanying family member or spouse on this trip?

No

Name and Relationship to Traveler:

N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

March 10th 2023

Date



Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Bill Cassidy

(Print Senator's/Officer's Name)

hereby authorize

Patrick Fox

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

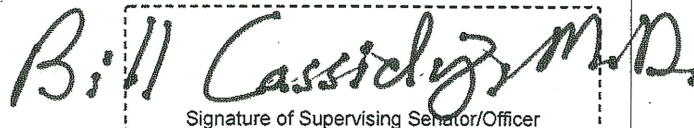
I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☐

(signify "yes" by checking box)

3/10/2023

Date



Signature of Supervising Senator/Officer

Postsecondary National Policy Institute (PNPI): PNPI's Debt & Repayment Seminar

 PATRICK FOX

Title:

None

Employing Office/Committee:HEALTH, EDUC, LAB, AND PENSIONS -
REP**Duty Station:**

WASHINGTON,DC

Destination(s):

Warrenton, Virginia

Explain how this trip is specifically connected to the traveler's official or representational duties:

PNPI does a good job of bringing in experts on higher ed for open conversations and explanations about higher education. I have attended these events in the past and found them to be incredibly informative. This particular one will be focused on student loan debt and repayment and I believe because of the current landscape of higher education it would be beneficial to hear multiple viewpoints of this issue.

Name of accompanying family member (if any):

Not Entered

Name and Relationship to Traveler:

None

Organization Information

Organization Name

Postsecondary National Policy Institute (PNPI)

§501(c)(3) Organization Type

Public Charity

Address 2 (Optional)

Public Charity

Phone Number

2024073172

Is your organization classified as a §501(c)(3)?☒ Yes☐ No**Address**

1828 L Street NW

City, State Zip

Washington, District Of Columbia 20036 United States

Organization URLpnpi.org

History of Congressional Travel

Since 2012, PNPI has sponsored twenty-three congressional staff seminars on postsecondary topics including federal student aid, higher education accreditation, student data, and competency-based education.

Educational Activities

In addition to multi-day seminars, PNPI sponsors Hill-based briefings for larger Hill audiences and is available to all congressional staff for postsecondary-related research support. PNPI also offers briefings, trainings, and boot camps to prospective policymakers and postsecondary policy leaders.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This trip is designed to increase participants' understanding of federal student debt and federal student loan repayment.

Explain how the purpose of the trip relates to your organization's mission.

PNPI provides professional development to current and prospective policymakers who work on higher education issues. This event is designed to increase congressional staff's knowledge of federal student loan debt and repayment. A detailed agenda is attached.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

1. The Bill and Melinda Gates Foundation
2. The Kresge Foundation

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
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Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

- i** Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
04/11/2023 @ 09:00 AM



Trip End Date/Time:
04/12/2023 @ 05:00 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

- ☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$109.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Other	Coach	\$109.00

Note

This cost is for round trip on a shuttle bus.

Lodging (Per Member/Officer/Employee: \$98.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/11/2023	04/12/2023	Airlie Conference Center	Warrenton	Virginia	United States	1	\$98.00	No

Meals (Per Member/Officer/Employee: \$79.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/11/2023	\$0.00	\$15.00	\$26.00	\$5.00	\$46.00	Warrenton	Virginia	United States	No
04/12/2023	\$13.00	\$15.00	\$0.00	\$5.00	\$33.00	Warrenton	Virginia	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$238.00)

Expense Type	Amount	Notes
Conference Fees	\$238.00	Meeting space/AV/WiFi

Additional Attachments All additional attachments are below.**Document Name**

Revised Itinerary

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Travel Destination(s): Warrenton, VA

Sponsor: Postsecondary National Policy Institute (PNPI)

MaryEllen McGuire

(printed name of sponsor representative)

President and Founder

(title)

DocuSigned by:

MaryEllen McGuire

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(signature of sponsor representative)

2/27/2023

(date)

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form*. The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: The Bill and Melinda Gates Foundation

Private Sponsor: The Postsecondary National Policy Institute

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Destination(s): Warrenton, VA

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☒ The grantmaking organization is a § 501(c)(3) organization.
- ☒ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☒ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☒ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☒ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Kathryn Young

Senior Program Officer

(Printed name of grantmaking organization representative)

(Title)

DocuSigned by:

Kathryn Young

724D86038FA044D...

2/17/2023

(Signature of grantmaking organization representative)

(Date)

Grantmaking Organization Certification Form

Instructions: If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form*. The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: The Kresge Foundation

Private Sponsor: The Postsecondary National Policy Institute

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Destination(s): Warrenton, VA

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☒ The grantmaking organization is a § 501(c)(3) organization.
- ☒ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☒ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☒ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☒ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Caroline Altman Smith

Deputy Director, Education

(Printed name of grantmaking organization representative)

(Title)

DocuSigned by:

Caroline Altman Smith

2/9/2023

F7A7C459DAB74E6...

(Signature of grantmaking organization representative)

(Date)

ATTACHMENT:
Senate Private Sponsor Travel Certification Form

Name and title of Senate invitees:

Viviann Anguiano
Senior Policy Advisor
Senator Sanders (I-VT)
Senate Committee on Health,
Education, Labor and Pensions
[Viviann Anguiano@help.senate.gov](mailto:Viviann_Anguiano@help.senate.gov)

Jessica Cardichon
Education Policy Director
Senator Sanders (I-VT)
Senate Committee on Health,
Education, Labor and Pensions
jessica_cardichon@help.senate.gov

Ramon Carranza
Legislative Assistant
Senator Schumer (D-NY)
[Ramon Carranza@schumer.senate.gov](mailto:Ramon_Carranza@schumer.senate.gov)

Patrick Fox
Education Policy Advisor
Senator Cassidy (R-LA)
Senate Committee on Health,
Education, Labor and Pensions
[Patrick fox@help.senate.gov](mailto:Patrick_fox@help.senate.gov)

Emily McBride
Legislative Assistant
Senator Tuberville (R-AL)
[Emily mcbride@tuberville.senate.gov](mailto:Emily_mcbride@tuberville.senate.gov)

Alanna Purdy Montesinos
Legislative Assistant
Senator Lujan (D-NM)
[Alanna PurdyMontesinos@lujan.senate.gov](mailto:Alanna_PurdyMontesinos@lujan.senate.gov)

Lauren Schwensen
Education Policy Advisor
Senator Cassidy (R-LA)
Senate Committee on Health,
Education, Labor and Pensions
[Lauren Schwensen@help.senate.gov](mailto:Lauren_Schwensen@help.senate.gov)

All staff were invited due to their employment with the Senate HELP Committee, Senate Appropriations Committee, or with a Member who sits on the Senate HELP committee or Senate Appropriations Committee.



February 28, 2023

Dear Patrick,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) Debt and Repayment Seminar on April 11 and 12, 2023, in Warrenton, VA at Airlie Conference Center. This seminar is designed to deepen your understanding of federal student loan debt and repayment. Included with this invitation are the forms necessary for ethics rules compliance. **By Sunday, March 12, 2023, you must submit these included forms and documents directly to the Ethics Committee in Hart 220. They are:**

- A copy of this PNPI invitation;
- A completed Private Sponsor Travel Certification Form with all attachments, including a Senate invitee list;
- An itinerary and agenda; and
- A completed and signed Employee Pre-Travel Authorization Form.

After receiving the completed travel package, the Ethics Committee will review it and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all Senate employees to maintain copies of all submitted forms for their own records. After the seminar, we will provide you with a post-travel form that you will need to complete and submit. If you do not submit the required paperwork by the Committee's deadline of March 12, you will not have the option to participate. **Paperwork submitted to the Ethics Committee after the deadline will not be considered.**

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations. No government, individual, foreign, corporate or special interest money is accepted. The foundations supporting PNPI are the Bill and Melinda Gates Foundation and the Kresge Foundation. No funding has been earmarked for this specific trip by any of PNPI's funders. PNPI is the sole sponsor, planner, and executor of the trip. PNPI maintains autonomy over the agenda, invitations, and event materials.

We will depart for the seminar at 9:00am on Tuesday, April 11 from Peace Circle at Pennsylvania Avenue and First Street NW in Washington, D.C. The program will begin at Airlie at 10:30am and will conclude on Wednesday, April 12 at 5:00pm. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's Debt and Repayment Seminar promises to be both educational and productive. We look forward to your participation!

Sincerely,

MaryEllen McGuire

MaryEllen McGuire, President
Postsecondary National Policy Institute (PNPI)
mcguire@pnpi.org/202-407-3172



**Federal Student Loan Debt & Repayment
Seminar**

**April 11-12, 2023
Warrenton, Virginia**

Tuesday, April 11

8:45am **Staff arrive to board shuttle**
Peace Circle
Pennsylvania Ave and First Street NW, Washington, D.C.

9:00am **Depart Peace Circle**

10:15am **Arrive at Airlie**
6809 Airlie Road
Warrenton, VA 20187

10:15-10:30am **Check-In and Registration**

10:30am- 12:00pm **Welcome & Debt Overview**

Speakers: *Betsy Prueter, Postsecondary National Policy Institute (PNPI); MaryEllen McGuire, PNPI; and Jinann Bitar, The Education Trust*

This session will provide an overview of federal student loan debt, including how much students and families are borrowing to attend college; the types of institutions borrowers are attending; and how borrowing and debt patterns vary across income and demographics.

12:00-1:00pm **Lunch with Experts**

Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.

1:00pm-2:30pm Delinquency & Default Overview

Speakers: *Regan Fitzgerald, Pew Charitable Trusts and Victoria Jackson, The Education Trust*

This session will provide an overview of delinquency and default, including how borrowers enter delinquency and/or default; how deferments and forbearances work; trends in delinquency and default rates over time; and how borrower demographics impact the likelihood of default.

2:30-2:45pm Break**2:45-4:15pm Borrower Perspectives on Debt & Default**

Speakers: *Tia Caldwell, New America and Melissa Emrey Arras, The Government Accountability Office (GAO)*

This session will examine students' perceptions of financing a college education including the gaps between what students identify as "reasonable" debt and what they deem as "expected" debt. It will also review how students and borrowers view their own debt balances and default experiences.

4:15-4:30pm Break**4:30- 5:00pm Closing Discussion**

Speaker: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

In this session, participants will review the day's programming and share any additional questions they have on debt, delinquency, and default.

5:00-6:00pm Break**6:00-7:00pm Working Dinner**

Facilitator: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

Dinner will provide an opportunity for staff to ask expert panelists additional questions in a smaller group setting. In addition, PNPI staff will provide a preview of the second day of programming.

Wednesday, April 12

8:30-9:00am **Breakfast**

9:00-10:15am **Welcome & Overview of Repayment Plans**

Speakers: *Betsy Prueter, PNPI; MaryEllen McGuire, PNPI; James Bergeron, National Council of Higher Education Resources (NCHER); and Lexi West, Pew Charitable Trusts*

This session will provide an overview of all federal repayment plans, the frequency with which the various plans are used, and the advantages and disadvantages of the current system.

10:15-10:30am **Break**

10:30-11:15am **Overview of Public Service Loan Forgiveness Program (PSLF)**

Speaker: *Lexi West, Pew Charitable Trusts*

This session will provide an in-depth overview on PSLF.

11:15-11:30am **Break**

11:30am-12:30pm **Repayment Simulation**

Speaker: *Lexi West, Pew Charitable Trusts*

This session will allow participants to learn more about the strengths and challenges of repayment plans by applying the plans to a borrower profile.

12:30-1:30pm **Lunch with Experts**

Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.

1:30-2:45pm **The Cost of Federal Student Loan & Repayment Programs**

Speakers: *Noah Mann, Office of Management & Budget and Katherine Sydor, Office of Management & Budget*

This session will examine the cost of the federal student loan and repayment programs and the major drivers of costs and savings each year.

2:45-3:00pm **Break**

3:00- 4:15pm Roundtable Discussion: Current Issues in Debt & Repayment

Speakers: *Preston Cooper, Foundation for Research on Equal Opportunity; Jason Delisle, The Urban Institute; and Sarah Sattelmeyer, New America*

This session will allow participants to ask any remaining questions of our experts regarding debt and/or repayment.

4:15-4:20pm Break**4:20-5:00pm Closing Discussion**

Speaker: *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

In this session, participants will review the day's programming, share what they have learned over the two days, consider how they might apply what they learned, and share any additional questions they have on debt and repayment.

5:00pm Depart Airlie**6:15pm Arrive at Peace Circle, Washington, D.C.**



**Federal Student Loan Debt & Repayment
Seminar
April 11-12, 2023
Warrenton, Virginia**

Tuesday, April 11

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